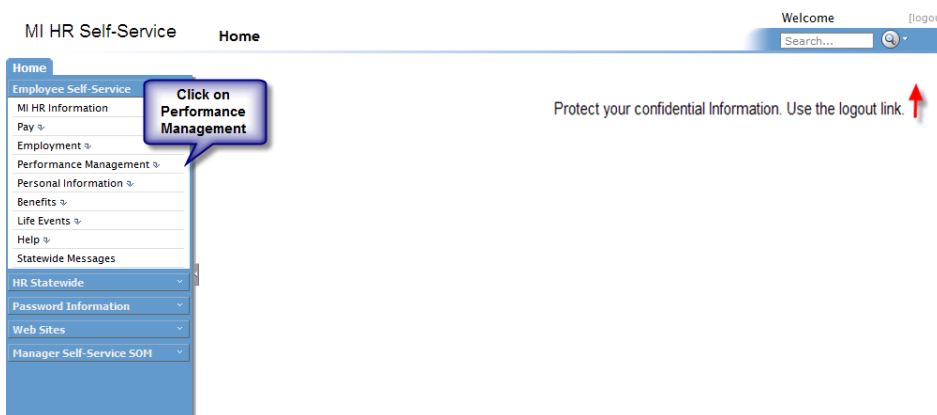


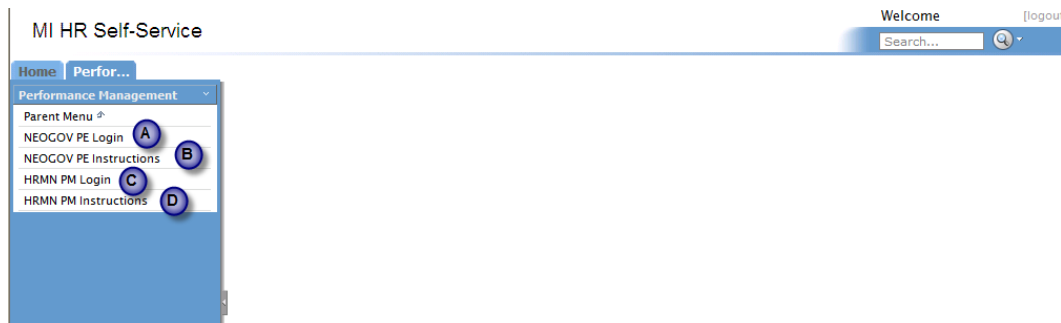
Module #4	Employee Performance (Evaluation) Plans
Objective:	This How To focuses on employees and their performance (evaluation) plans.
Pre-Module Requirements	
<ul style="list-style-type: none"> Employee has received access to the system. 	
Glossary	
<ul style="list-style-type: none"> Performance plans can also be called Evaluation Plans. 	

Steps:

1. In MI HR Self Service, click on the **Performance Management** bookmark.



2. In the Performance Management bookmark are links to the following:
 - A. NEOGOV PE login**
If you have been provided with an email to access NEOGOV PE, use this link.
 - B. NEOGOV PE instructions**
For information on how to use NEOGOV PE including an overview of the system, use this link.
 - C. HRMN PM login** (HRMN Performance Management system)
If you have current plans in the HRMN PM, you will finish your plan there before using NEOGOV PE. Therefore, use this link.
 - D. HRMN PM instructions**
For information on how to use HRMN PM, use this link.



Module #4

- You should have received an **Activate Your NEOGOV PE User Account** email with a link to create your account **Password** using your email address as your **Username**.

PLEASE NOTE: Current NEOGOV Insight HR Users will use their Insight username and password.

- Log into the NEOGOV PE site using your **Username** and **Password**. Click on **Sign In >>** button.

- When you log in, you'll arrive at your **My Dashboard**.
- Employee performance (evaluation) plan templates will be established for all employees. These templates will include a task to acknowledge the plan. In addition to the acknowledgement task, these templates may also include tasks to self-rate your own plan. You will see these tasks in your **My Tasks** section of the dashboard. Once a task is completed, it is removed from the "current" view of the **My Tasks** section on the dashboard.

Note: The acknowledgement of plan task will not populate until the performance (evaluation) plan has been started/made ready for review (published) by your manager/supervisor. How to acknowledge a performance (evaluation) plan is covered in module 12.

Module #4

- Click on the link for **View All of My Evaluations** or the **Evaluation Card** displaying on the dashboard.
Note: Only the most recent 3 evaluations will display as evaluation cards on the dashboard. They are sorted by due date in descending order.

The screenshot displays the NEOGOV PE dashboard for a user named MCSC EMPLOYEE. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown, a search bar, and user profile information. Below the navigation bar, there are tabs for 'Employees' and 'Library'. The main content area is titled 'My Tasks' and features a summary row with six colored boxes: 'Total' (2), 'Rating' (0), 'Appri' (0), 'Sign' (2), 'Approve' (0), and 'Other' (0). Below this is a 'Task' table with columns: Task, For Employee, Related To, and Due Date. Two tasks are listed: 'Sign Demo of Job Aids for MCSC EMPLOYEE' (Due: 04/23/2016) and 'Sign MSHDA Demo 3-29-16 for MCSC EMPLOYEE' (Due: 12/31/2016). Below the table is a 'My Evaluations' section with three cards: 'Demo of Job Aids' (Due: Sat, Dec 31, 2016, Status: Not Started), 'MSHDA Demo 3-29-16' (Due: Sat, Dec 31, 2016, Status: Approval), and 'Job Aids' (Due: Thu, Dec 31, 2015, Status: Draft). Two callout boxes are present: one pointing to the 'view all of my evaluations' link with the text 'Click on View All Of My Evaluations to go to the Evaluation Detail Page', and another pointing to the 'MSHDA Demo 3-29-16' card with the text 'Click on the evaluation card to be taken to the specific evaluation'.

Task	For Employee	Related To	Due Date
Sign Demo of Job Aids for MCSC EMPLOYEE	MCSC EMPLOYEE	Demo of Job Aids	04/23/2016
Sign MSHDA Demo 3-29-16 for MCSC EMPLOYEE	MCSC EMPLOYEE	MSHDA Demo 3-29-16	12/31/2016

Task	Due Date	Status
Demo of Job Aids	Sat, Dec 31, 2016	Not Started
MSHDA Demo 3-29-16	Sat, Dec 31, 2016	Approval
Job Aids	Thu, Dec 31, 2015	Draft

- The performance (evaluation) plan template will be listed in the **Performance Evaluations** section of the page.
- Click on the plan (evaluation) name.

Module #4

The screenshot displays the NEOGOV PE Perform interface. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown, a search bar, and user information for 'MCSC EMPLOYEE'. The left sidebar shows navigation options: Employees, Library, My Dashboard, Employee, Reports, Org Chart, and Manager. The main content area is divided into two sections: 'Employee Details' and 'Performance Evaluations'.

Employee Details:

Employee #:	456321	Class Spec:	PE-HUMAN
Email:	peapi+employee@mitraining.com		RESOURCES
Position:	PE-Human		ANALYST
	Resources Analyst	Department:	PE-CIVIL SERVICE
Address:			COMMISSION
Phone:		Division:	
Active:	Yes	Online Access:	Activated
		Start Date:	05/07/2006
		Separation Date:	

Performance Evaluations:

Below the 'Performance Evaluations' heading is a table with the following columns: Evaluation Name, Evaluation Type, Due Date, Status, Completion Date, Description, and Arch. The table contains one row with the following data:

Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Description	Arch
Job Aids	Periodic	12/31/2015	Not Started			No

A callout bubble points to the 'Evaluation Name' column header with the text: 'Click on the Evaluation Name'.

- The **Evaluation Detail** page lists information specific to your performance (evaluation) plan including name, type (periodic or probation), your name, position, and department/division.
- The performance (evaluation) plan template will be in **Draft Status** upon receipt and will remain in that status until it is started/ready for review (published).
- Most agencies have established performance (evaluation) plan dates. The dates you receive will reflect the established dates for your agency or organizational unit including the **Due Date**. (Probationary plans will be covered in a separate module.)
- The **Overall Rating** will display as Pending until the performance (evaluation) plan review has been completed.
- If your agency is using a paper performance plan process, you will be notified and provided instructions on using the **Print a Blank Rating Form** function.
- Changes can be made to objectives and competencies in the plan until the Manager/Supervisor has started/made the plan ready for review (published it).

Module #4

16. Objectives - These are the individual actions that the Manager/Supervisor and employee agree the employee will be rated on in this performance (evaluation) plan for this rating period. Objectives should be SMART (Specific, Measureable, Attainable, Relevant, and Time-Based). Please see your HR Office if you need assistance in creating, or understanding SMART objectives.

17. Employees can edit/add/delete objectives until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the addition of objectives. Other Managers/Supervisors may complete all of the plan updates in PE.

Module #4

General

DUE DATE
Thu. Dec. 31, 2015

STATUS
Draft

Evaluation Name Job Aids Employee MCSC EMPLOYEE
Type Periodic Position PE-Human Resources Analyst
Archived No Department PE-CIVIL SERVICE
COMMISSION

Content

OBJECTIVE SECTION | STANDARD 3 POINT SCALE + Add Items

Objective Section

Items	Description	Progress	Actions
1901 CSC Utilize Wee...	Utilize weekly reports effectively to monitor and ...	0% <div></div>	×
1901 CSC Utilize the ...	Utilize the Siebel application fully, including the ...	0% <div></div>	×
1901 CSC Follow the ...	Follow the approved standardized office set-up. ...	0% <div></div>	×

18. If your Manager/Supervisor asks for your assistance in adding objectives to the plan, click on **Add Items** and select **New Objective**. (Department strategic objectives will be available **From Library**. If your department is using this functionality, you will be instructed on what to select from the library. The State of Michigan is not using objectives **From Class Specification**.)

Module #4

The screenshot shows the NEOGOV PE Perform interface. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown, a search bar, and user information for 'MCSC EMPLOYEE'. The left sidebar contains links for 'My Dashboard', 'Employee', 'Reports', 'Org Chart', and 'Manager'. The main content area is divided into 'General' and 'Content' sections.

General Section:

DUE DATE Thu. Dec. 31, 2015		STATUS Draft	
Evaluation Name	Job Aids	Employee	MCSC EMPLOYEE
Type	Periodic	Position	PE-Human Resources Analyst
Archived	No	Department	PE-CIVIL SERVICE
		COMMISSION	

Content Section:

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Items	Description	Progress
1901 CSC Utilize Wee...	Utilize weekly reports effectively to monitor and ...	0% <div></div>
1901 CSC Utilize the ...	Utilize the Siebel application fully, including the ...	0% <div></div>
1901 CSC Follow the ...	Follow the approved standardized office set-up. ...	0% <div></div>

A callout box highlights the '+ Add Items' button, which opens a menu with the following options:

- From Objective Library
- From Class Specification
- From Development Plan
- New Objective

A second callout points to the 'New Objective' option.

19. The **Add Objective** box will appear.

20. Add an objective in **Title**.

21. **Enter a Description** to ensure both the employee and manager/supervisor are clear on what the objective is intended to achieve and how it will be measured.

22. Select an **Objective Category** for the objective. Most objectives will be categorized as **Employee**. Objective categories are outlined below:

- **Employee** objectives are associated with the employee's activities for the review (evaluation) period.
- **Department** objectives are associated with the department's strategic plan, mission, vision, etc.
- **Strategic** objectives are associated with the initiatives, projects, business plan, etc.

Module #4

Add Objective

Cancel

Save

Title

New Objective

Description

Give it a description

Category

Employee

23. Repeat these steps for all additional objectives.

24. Each objective is accompanied by a **Progress** slider bar, which you may use to update the % complete for that objective. Reports may also be run by Manager/Supervisors on this information.

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

+ Add Items

Objective Section

Items	Description	Progress	Actions
1901 CSC Utilize Wee...	Utilize weekly reports effectively to monitor and pr...	0% <div>The progress slider bar</div>	×
1901 CSC Utilize the S...	Utilize the Siebel application fully, including the qu...	0%	×
1901 CSC Follow the ...	Follow the approved standardized office set-up. U...	0%	×


Module #4

25. To **Edit** an **Objective** click on the **pencil** icon. NOTE: Only objective added as “New Objectives” can be edited (Objectives added from the Library are not editable).

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

+ Add Items

Items	Description	Progress	Actions
1901 CSC Utilize Wee...	Utilize weekly reports effectively to monitor and pr...	0% <div></div>	×
1901 CSC Utilize the S...	Utilize the Siebel application fully, including the qu...	0% <div></div>	
1901 CSC Follow the ...	Follow the approved standardized office set-up. U...	0% <div></div>	
New Objective	Job Aids	0% <div></div>	× 

To edit an objective, click on the pencil icon

26. **Update/Edit** the applicable fields and then click on **Save**.

Edit Item

Cancel

Save

Title

Edit an Objective

Description

Job Aids

Category

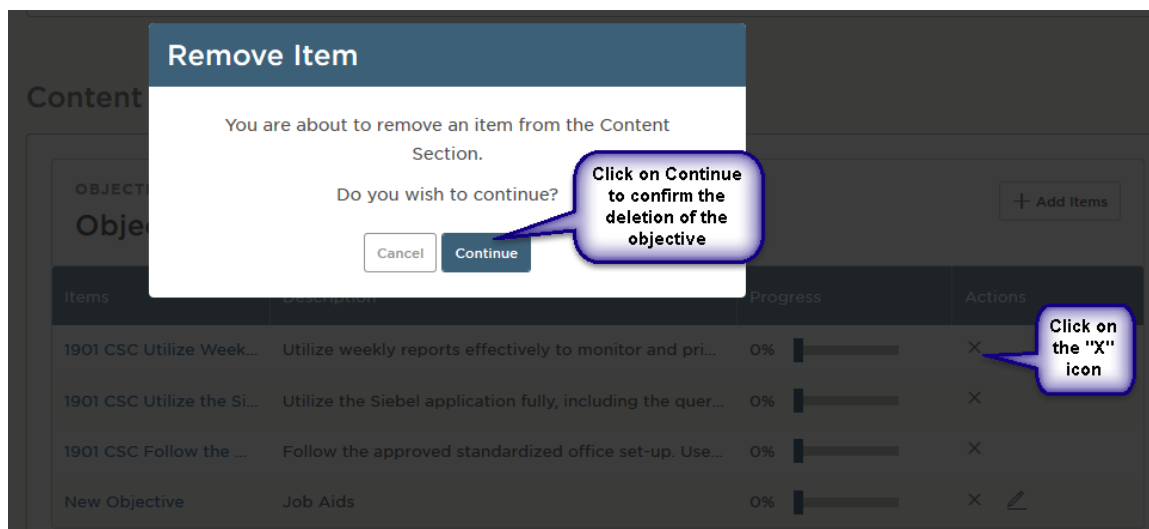
Employee

▼

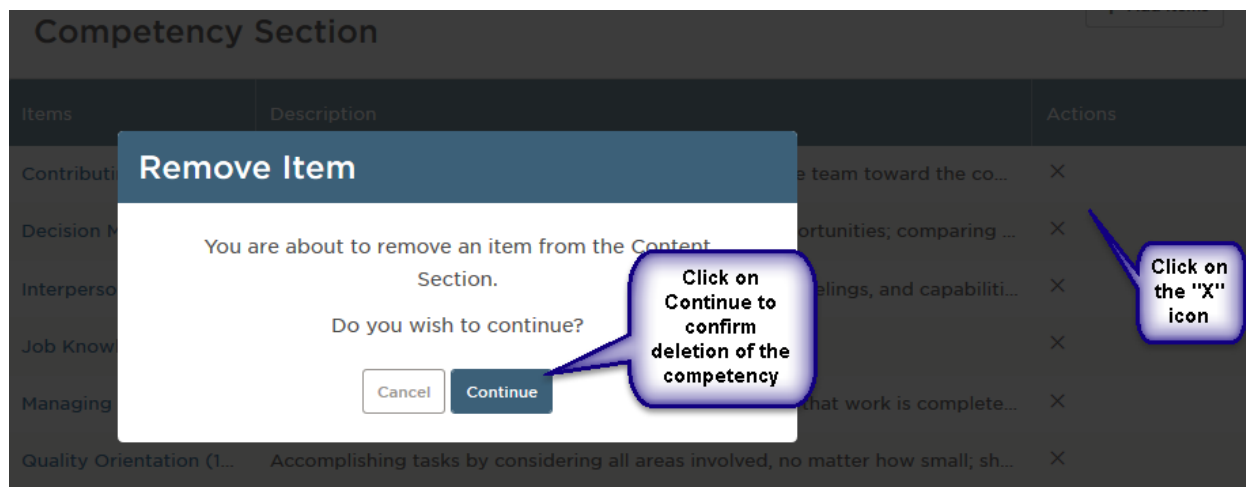
Update/Edit the fields and click on save

Module #4

27. Objectives can be updated, added or deleted. To delete an objective, click on the "X" icon in the **Actions** column. The system will prompt you to confirm the deletion of the objective. To add an objective, repeats steps 18-22 in this module.



28. **Competencies** are assigned to the performance (evaluation) plan template based on ECP (Equitable Classification Plan) Group. All ECP Group competencies associated with the job classification will default into the plan.
29. Employees can add/delete competencies until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the deletion or addition of competencies. Other Managers/Supervisors may complete all the plan updates in PE.
30. After review and discussion with your Manager/Supervisor, the competencies that will not be evaluated (rated) in this review (evaluation) period should be deleted by clicking on the "X" icon in the **Actions** column. The system will prompt you to confirm the deletion of the competency.



Module #4

31. Two options exist to add competencies back to the performance (evaluation) plan.

- Click on **Add Items** and select **From Library**.
- Click on **Add Items** and select **From Class Specification** (see step #38).

COMPETENCY SECTION | STANDARD 3 POINT SCALE

Competency Section

Items	Description	
Contributing to Team ...	Actively participating as a member of a team to move the team toward...	
Decision Making (100)	Identifying and understanding issues, problems, and opportunities; comparin...	X
Interpersonal Skills (1...	Considering and responding appropriately to the needs, feelings, and capabil...	X
Job Knowledge (100)	Behaviors should be specific to the individual job.	X
Managing Work (100)	Effectively managing one's time and resources to ensure that work is comple...	X
Quality Orientation (1...	Accomplishing tasks by considering all areas involved, no matter how small; s...	X

Click on Add Items

Select from Competency Library

+ Add Items

- From Competency Library
- From Position
- From Class Specification
- From Development Plan

32. The Library will list all competencies for all Groups.

Add Items

Cancel Save

Competency library

Q

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Action Orientation (Judicial Prof)	Initiating action with a drive to achieve an...	
<input type="checkbox"/>	Adaptability (100)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (200)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (310)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (320)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (400)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Admin)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Leader)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Prof)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Aligning Performance For Success (310)	Focusing and guiding others in accomplish...	

<< < 1 2 3 4 5 6 7 8 9 10 ... > >>

Module #4

33. If you do not know your Group, you can find the information in the Compensation Manual. The Compensation Manual is available on the Civil Service Commission (intranet) Insider under Top 10 Links or on the Civil Service Commission home page (internet) under MCSC Quick Links.

34. Click on Section A in the Compensation Manual.

The screenshot displays the MCSC website's Compensation Plan section. On the left is a navigation menu with links such as 'Rules', 'Regulations', 'State Personnel Director Official Communications', 'Advisory Bulletins', 'Compensation Plan', 'Grievances, Complaints & Appeals', 'DSTARS Decision Database', 'Other Regulatory Information', 'Civil Service Commission', 'Employment', 'Career Services', 'Inside Civil Service', 'Employee Benefits', 'Disability Management', and 'State Board of Ethics'. At the bottom of the menu is a 'State Jobs' button with the text 'View Current Openings'.

The main content area features several sections:

- Compensation Plan Introduction**: Includes a link to 'Plan Introduction 10/01/2012' and a note that the plan is effective October 1, 2012. It states that the rates are official for all classifications.
- Compensation Plan Codes**: Lists links for 'Codes Used in Designating Classification Group', 'Codes Used in Designating Exclusive Representation Units', 'Job Category Definitions and Codes', and 'Codes Used in Designating Overtime Pay Eligibility', each with a PDF icon.
- Compensation Plan 10/01/2012 (PDF Version)**: Contains links for 'Section A - Alphabetic List of Classes 10/01/2012', 'Section B - Numeric List of Pay Ranges 10/01/2012', 'Section C - Pay Schedules for Classifications in Performance Pay Programs (includes the Staff Attorney and Student Assistant schedules) 10/01/2012', and 'Teacher Pay Schedules 10/01/2012', all with PDF icons.
- Compensation Plan 10/01/2012 (Interactive Version)**: Includes a link for 'Section A - Alphabetic List of Classes 10/01/2012'.

A callout box with the text 'Click on Section A' points to the 'Section A' link in the 'Compensation Plan 10/01/2012 (PDF Version)' section. On the right side of the page, there is a list of 'MCSC Quick Links' including 'MCSC Phone Book', 'Job Specifications/Pay', 'Compensation Plan 2012-2013', 'MCSC Rules and Regulations Updates', 'State of MI Workforce Reports', 'MCSC Forms', 'Military Leave', 'Retiree Information', 'Michigan Education Savings Program', 'Michigan Education Trust', 'ADA Complaint Process & Form', and social media icons for Twitter, YouTube, and Facebook. The 'PURE MICHIGAN' logo is at the bottom right.

35. Locate your HRMN Position Description (job classification) and review the information in the Job Class column. CL1 is Group 1; CL2 is Group 2; CL3 is Group 3 (there is a Group 3 Manager/Supervisors and a Group 3 Supervisors); CL4 is Group 4.

Module #4

HRMN Position Description	Grade	Core Pos Code	Schedule	Unit	Exempt	Salary Class	Pay Plan	Shift	Job Cat	Job Class	10/1/12 Minimum	10/1/12 Maximum
Dept Of State Branch Supv-4	12	DSBRSPV4	NERE-180	Y 51	Y	H	BWE1	Y	05	CL3	\$21.41	\$31.30
Dept Of State Branch Supv-5	13	DSBRSPV5	NERE-182	Y 51	Y	H	BWE1	Y	05	CL3	\$22.88	\$34.14
Departmental Analyst Train-E	9	DEPTTRE	NERE-002P	Y 23	N					CL2	\$19.42	\$31.30
Departmental Analyst Train-E	9	DEPTTRE	NERE-002P	Y 99	N					CL2	\$19.42	\$31.30
Departmental Analyst-E	9	DEPTALTE	NERE-174	Y 99	N					CL2	\$18.50	\$23.21
Departmental Analyst-E	9	DEPTALTE	NERE-174	Y 23	N	H	BWN2	Y	02	CL2	\$18.50	\$23.21
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y 23	N	H	BWN2	Y	02	CL2	\$17.80	\$24.51
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y 99	N	H	BWN2	Y	02	CL2	\$17.80	\$24.51
Departmental Analyst-E	P11	DEPTALTE	NERE-174	Y 99	Y	H	BWE1	Y	02	CL2	\$19.87	\$28.97
Departmental Analyst-E	P11	DEPTALTE	NERE-174	Y 23	Y	H	BWE1	Y	02	CL2	\$19.87	\$28.97
Departmental Analyst-A	12	DEPTALTA	NERE-180	Y 99	Y	H	BWE1	Y	02	CL2	\$21.41	\$31.30
Departmental Analyst-A	12	DEPTALTA	NERE-180	Y 23	Y	H	BWE1	Y	02	CL2	\$21.41	\$31.30
Departmental Analyst-A	12	DEPTALTA	NERE-180	Y 51	Y	H	BWE1	Y	02	CL2	\$21.41	\$31.30
Departmental Manager-1	12	DEPTMGR1	NERE-180	Y 51	Y	H	BWE1	Y	02	CL3	\$21.41	\$31.30
Departmental Manager-2	13	DEPTMGR2	NERE-182	Y 51	Y	H	BWE1	Y	02	CL3	\$22.88	\$34.14

Locate your HRMN
Position Description
(Job classification)

Review information in
Job Class column

36. Select the appropriate competency by clicking in the checkbox in front of it and clicking on **Assign**.

Add Items
Cancel Save

Competency library
Click on Save

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Action Orientation (Judicial Prof)	Initiating action with a drive to achieve an...	
<input type="checkbox"/>	Adaptability (100)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (200)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (310)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (320)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (400)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Admin)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Leader)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Prof)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Aligning Performance For Success (310)	Focusing and guiding others in accomplish...	

<< < 1 2 3 4 5 6 7 8 9 10 ... > >>

Module #4

37. The competency is added back to the performance (evaluation) plan.
38. The other option for adding a competency back to a performance (evaluation) plan is to click on **Add Items** and select **From Class Specification**.

COMPETENCY SECTION | STANDARD 3 POINT SCALE

Competency Section

Items	Description	
Contributing to Team ...	Actively participating as a member of a team to move the team toward...	
Decision Making (100)	Identifying and understanding issues, problems, and opportunities; comparin...	X
Interpersonal Skills (1...	Considering and responding appropriately to the needs, feelings, and capabil...	X
Job Knowledge (100)	Behaviors should be specific to the individual job.	X
Managing Work (100)	Effectively managing one's time and resources to ensure that work is comple...	X
Quality Orientation (1...	Accomplishing tasks by considering all areas involved, no matter how small; s...	X

Click on Add Items

Select From Class Specification

- From Competency Library
- From Position
- From Class Specification
- From Development Plan

+ Add Items

39. Selecting **From Class Specification** will add all competencies associated with the Group back onto the performance (evaluation) plan. (Deleting competencies is covered in step #30 above.)
40. **Plan Acknowledgements** are defaulted via the performance (evaluation) plan template. The acknowledgement is used to have an employee and/or manager certify that they have seen and reviewed the objectives and competencies assigned in the performance (evaluation) plan that will be used for the current rating period.

Note: The plan acknowledgement task is not available to an employee until the performance evaluation is started/ready for review (published).

How to acknowledge a performance (evaluation) plan is covered in module 12

Process

+ Add Task

Employee Acknowledgement

Before Ratings

1

Signature MCSC EMPLOYEE	Due Wed, Dec 23, 2015	Status Pending 12/16/2015	Step is required Yes
----------------------------	--------------------------	---------------------------------	-------------------------

Module #4

41. Self/Peer Ratings can be used to assign a self/peer rating to the performance (evaluation) plan. This is typically assigned within the performance (evaluation) plan template. Please contact your HR Office to have self/peer ratings added to the plan.

42. The **Rating of Record** is assigned on the performance (evaluation) plan template. Employees *may* be required to conduct a self-rating before the performance (evaluation) plan due date.

The manager/supervisor is required to rate the employee before the performance (evaluation) plan due date. The manager/supervisor rating due date is 12/31/2015. The manager/supervisor serves as the **Rater of Record**.

2

Ratings				
Rating	Due	Status	Step is required	Weight
MCSC MANAGER	Thu, Dec 31, 2015	Pending 12/16/2015	Yes	100 %

43. The **Rating Acknowledgements** are defaulted via the performance (evaluation) plan template. The rating acknowledgement is used to have the employee certify that they have seen and reviewed the performance (evaluation) plan rating for the current rating period.

How to acknowledge a performance rating is covered in module 13.

3

After Ratings			
Signature	Due	Status	Step is required
MCSC EMPLOYEE	Thu, Dec 31, 2015	Pending 12/16/2015	Yes

Rating Acknowledgement

Evaluation Due Date	Thu, Dec 31, 2015
---------------------	-------------------

44. **Tasks** for the employee's plan acknowledgement, rating acknowledgement, self-rating (if applicable) and the manager/supervisor review will be defaulted into the plan from the performance (evaluation) plan template. These tasks will appear on the associated employee's (and manager/supervisor's) **My Dashboard**.

NEOGOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

My Tasks

Current

Acknowledgement of Plan task on the Dashboard

Subject	Due Date	Related to	Actions
Sign Job Aids for MCSC EMPLOYEE	12/23/2015	Evaluation MCSC EMPLOYEE	

MCSC EMPLOYEE
PE-HUMAN RESOURCES ANALYST

Module #4

45. New tasks can be added to the performance (evaluation) plan by clicking on the **Add Task** button.

The screenshot shows the NEOGOV PE interface. On the left is a sidebar with a user profile for 'MCSC EMPLOYEE', 'PE-HUMAN RESOURCES ANALYST', and navigation links for 'My Dashboard', 'Employee', and 'Reports'. The main content area has a 'Notes & Attachments' section with an '+ Add Notes & Attachments' button. Below it is a 'Process' section with a 'Before Ratings' step indicator. A callout bubble points to the '+ Add Task' button in the 'Process' section, with the text 'Click on Add Task'.

46. Enter a name in **Assignee**.

47. Enter a subject in **Title**.

48. Enter a **Description** if necessary.

49. Select a **Due Date** from the calendar.

50. **Email Notifications** can be set prior to the task due date or after.

51. Click on **Save** or **Cancel**.

The screenshot shows the 'Add Task' form. At the top is a dark blue header with the title 'Add Task' and 'Cancel' and 'Save' buttons. The form fields are: 'Assignee' (MCSC EMPLOYEE, callout 46), 'Title' (Job Aid, callout 47), 'Description' (Demo, callout 48), 'Due Date' (Wed, December 16, 2015, callout 49), and 'Email Notifications' (callout 50). A callout 51 points to the 'Save' button.

Module #4

52. **Notes & Attachments** can be added to the performance plan using the **New** button.

Notes & Attachments

Click on Add
Notes &
Attachments

+ Add Notes & Attachments

53. Notes can be typed directly. Some formatting including spell checker is available. They can also be attached by using the **+Attachment** button. If **Private Note** is checked, only you as the employee can see the note.

Add Note/Attachment

Cancel

Save

Note

Save or
Cancel

B **I** **U** ABC

Enter and format text here...

Enter and
format text

Attachment ⓘ

Click to add an
Attachment

+ Attachment

Nothing selected

** limit one attachment per note.*

☐ Private Note

Module #4

54. **Audit trail** will document when changes are made **Objectives**, **Competencies**, any fields within **Edit Employee Evaluation** (Evaluation type, Due Date, Evaluation Name, Numeric Scoring, Overall Rating, and Overall Rating Scale) and each time the performance (evaluation) plan is reverted to draft status/made ready for review (Published).

Audit trail

Field Name	New Value	Old Value	Updated By	Updated On
Competency	Adaptability (200)		MCSC MANAGER	12/03/2015 16:21:30
Building Trust (200) - ...	33.33	0.00	MCSC MANAGER	12/03/2015 16:21:30
Building Strategic Wo...	33.34	0.00	MCSC MANAGER	12/03/2015 16:21:30
Receive Customer Rat...	20		CHRISTINE SPITZLEY	12/03/2015 16:01:18
Goal	Receive Customer Rat...		CHRISTINE SPITZLEY	12/03/2015 16:01:10
1901 CSC Follow the A...	50	100.00	CHRISTINE SPITZLEY	12/03/2015 16:01:10
Is Published	False	True	MCSC MANAGER	12/03/2015 15:22:27
Is Published	True	False	CHRISTINE SPITZLEY	12/03/2015 13:49:13
Goal	1901 CSC Follow the A...		CHRISTINE SPITZLEY	12/03/2015 13:47:58

<<

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1

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Items per page10

1 - 9 of 9 items

55. When the performance (evaluation) plan is complete, the Manager/Supervisor will start/make the evaluation ready for review (publish). Once the plan is started/ready for review (published), changes cannot be made to the plan (unless reverted to draft status).
56. After the performance (evaluation) plan is started/ready for review (published), an email is sent to you regarding the **Acknowledgement of Plan**. After your acknowledgment of the plan (if additional acknowledgements are not required), a **Rate** star appears for the manager meaning that the plan is available for rating. (a rate star will only populate for you if a self-rating is assigned to the evaluation).
57. Once ready for review, the **Status** of the performance (evaluation) plan changes from **Draft** to **Not Started**.
58. The performance (evaluation) plan can now be printed using the **Print** feature.

Module #4

Evaluation Detail

Overall Rating
Pending

sign print print blank form

General

DUE DATE Thu. Dec. 31, 2015		STATUS Not Started	
Evaluation Name	Job Aids	Employee	MCSC EMPLOYEE
Type	Periodic	Position	PE-Human Resources Analyst
Archived	No	Department	PE-CIVIL SERVICE COMMISSION

59. Click on **My Dashboard** or the **NEOGOV** Icon.

60. If a self-rating has been included in your performance (plan) evaluation, you will now notice that there is a rate star in the **Actions** column in the **My Tasks** section of **My Dashboard**.

My Tasks

Current

Subject	Due Date	Related to	Actions
Rating For MCSC EMPLOYEE's Job Aids	12/31/2015	Evaluation MCSC EMPLOYEE	★

My Performance Evaluations →

The rate star indicates the evaluation is ready for rating

61. How to complete a self-rating is covered in module 10.

Module #4

62. To exit NEOGOV PE, click on **Sign Out**.

The screenshot shows the NEOGOV PE interface. At the top, there is a header bar with the NEOGOV logo, a 'PE Perform' dropdown, a search bar, and a user profile icon labeled 'MCSC EMPLOYEE'. A dropdown menu is open from the user profile icon, showing options: 'My Profile', 'Account Settings', 'Help', and 'Sign Out'. A callout box points to the 'Sign Out' option with the text 'Click on Sign Out'. Below the header, the left sidebar shows the user's profile and 'My Dashboard'. The main content area is titled 'My Tasks' and includes a table with columns: Subject, Due Date, Related to, and Actions. The table contains one row: 'Rating For MCSC EMPLOYEE's Job Aids', '12/31/2015', 'Evaluation MCSC EMPLOYEE', and a star icon. Below the table is a pagination bar showing '1' of 1 items. At the bottom, there is a link to 'My Performance Evaluations'.

Additional Resources:

NEOGOV PE Tutorial

Help & Training available in PE in the drop-down under your name (top right corner)

PE Glossary

For questions on the new system or this job aid, email MCSC-NEOGOV@michigan.gov

For questions on performance management plans, contact your HR Office